Release Notes - June 5, 2025

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Highlights

New Features
New Settings permissions

Coming Soon
Linked Accounts
Enhanced Delivery of Patient Statements

New features

New Settings permissions

This feature was turned on for all users on May 22.

We are offering more flexibility around **Settings** access.

- **Account Settings** permission - With this new permission AND the existing **Settings** permission turned on, you can access the **Account Settings** page.
- **Custom Fields** permission - With this new permission AND the existing **Settings** permission, you can access the **Manage Custom Data** page.
- **Office Settings** permission - With this new permission AND the existing **Settings** permission turned on, you can access the **Manage offices** page.
- **OnPatient Settings** permission - With this new permission AND the existing **Settings** permission turned on, you can access the **onpatient Settings** page.

No action is needed for users who already have the current **Settings** permission. You will automatically be granted the new permissions. Practice administrators can remove the new permission for users who need access removed to any of the new areas without impacting their access to other pages.

These new settings will automatically be turned on for new accounts with the **Nurse**, **Office Manager**, or **Provider** roles.

Knowledge base article

Enhancements

Updated font color for available time slots in the scheduling widget

The font color of the available time slots in the scheduling widget has been updated from grey to black, removing confusion about whether the slot is available to select.

Appointment API update

We added supervising provider and billing provider to the PATCH and PUT requests to match existing functionality on a POST request.

Resolutions

Plan section display issue resolved in clinical note

We fixed an issue where the **Plan** section was appearing in the final clinical note—even when there was no content in the section and the **Include in note** switch was turned off.

With this update, the **Plan** section now only appears in the final note when it contains data and has the **Include in note** switch turned on.

In addition, if the user has the **Include Lab Orders and Results** setting turned on:
- The **Lab Orders** table only shows orders associated with the appointment for the current note.
- The **Lab Results** table continues to show the entire patient's history of lab results.

If the **Include Lab Orders and Results** option is turned off, both the **Lab Orders** or **Lab Results** tables aren't rendered in the clinical note PDF. Plan header would also not render in the clinical note PDF if lab results or orders was the only data found for this form.

Clinical Notes Report filter fix

We've fixed an issue where users would receive an error when selecting the **Print non-blank Clinical Notes in Report** filter on the **Clinical Notes Report** screen. Specifically, when a date range was applied, the system incorrectly returned the "There are no non-blank clinical notes to print for the given date range" message even when valid notes were present.

With this update, you can now:
- Apply the **Print non-blank Clinical Notes in Report** filter

- Combine it with a date range and other filters for a single patient
- Generate reports successfully without encountering errors

Default office used when scheduling appointments

We fixed an issue where scheduling appointments from the **Doctor**, **Weekly**, or **Monthly** views defaulted to the first office in the calendar's office list instead of the provider's designated default office. Now, the provider's default office is correctly used.

Unable to POST request with custom appointment status

Custom appointment status changes are now allowed using a POST request.

Coming soon

Linked accounts

We are pleased to introduce the new linked accounts feature for providers managing multiple practice groups. Designate a primary account and link additional practice group accounts for effortless switching without separate logins.

To link your accounts, create a support case. Notifications are sent to confirm successful account linking.

Knowledge base article

Enhanced delivery of patient statements

We're excited to announce that patient statements can now be sent via:

- Text message
- Email
- Traditional mail

These new options are designed to streamline your workflow, boost efficiency, and accelerate patient payments. Ensure patient profiles have updated phone numbers and email addresses to take full advantage of this feature.